



# Dealer Group Registration and Change of Details

BT Adviser Services © 1800 025 127 (8.00am – 6.30pm Mon-Fri Sydney time)  
BT Margin Lending Contact Centre © 1800 671 409

Complete this form using **black pen** – print in clear **CAPITAL LETTERS**

Use this form to set up a new dealer group for BT Retail/Corporate Super and/or Margin Lending products, or change the details of an existing dealer group.

Please take the following action based on the information provided

- Register a new dealer group (Complete all sections)
- Change the details of an existing dealer group (Relevant sections to your change)

BT Adviser number

**A**

**AND**

Margin Lending Adviser number

## 1. NEW DEALER GROUP DETAILS

Dealer Group name

Please provide the adviser's AFSL Number/ASIC Authorised Representative Number and attach a copy of AFSL.

## 2. NEW DEALER CONTACT DETAILS

Office address

State  Postcode

Postal address (if different from above)

State  Postcode

Daytime phone number

(  )

Mobile phone number

Fax number

(  )

Email address

## 3. BANK ACCOUNT FOR FEE PAYMENTS

Fees will be paid into the following account

Name of financial institution

Branch name

BSB number

Account number

Account holder's name

## 4. TAXATION DETAILS

Please provide the Australian Business Number (ABN) of the Licensee. Fees cannot be paid if an ABN is not supplied.

Australian Business Number (ABN)

## 5. INVESTOR TRANSFER

If investors are to be transferred to the new dealer group please provide the existing adviser code and name, and complete a Bulk Investor Transfer form or Single Investor Transfer form available from [bt.com.au](http://bt.com.au)

Previous adviser name

Previous BT adviser number

**A**

**OR**

Previous Margin Lending adviser number

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## 6. ADVISER SIGNATURE

This section need to be signed by an Authorised Signatory of the new Dealer Group.

Signature of Adviser

Date (dd/mm/yy)


Signatory's name (please print)

*Adviser stamp (please use black ink only)*

### You can submit this form by:


#### Retail Corporate/Super

 mail BT  
GPO Box 2675  
Sydney NSW 2001

 fax (02) 9274 5670

#### Margin Lending

 mail BT Margin Lending  
GPO Box 3917  
Sydney NSW 2001

 fax (02) 9274 5782